

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2017-2018

Quarter: 1

PSA: 1

Provider: Legal Services of Northern California

Counties: Humboldt and Del Norte Counties

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 2

Provider: Legal Services of Northern California

Counties: Lassen, Modoc, Shasta, Siskiyou and Trinity

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 3

Provider: Legal Services of Northern California

Counties: Butte, Colusa, Glenn, Plumas, Tehama

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 4

California Legal Services (Title III B)
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Fiscal Year: 2017-2018

Quarter: 1

Provider: Community Legal, Inc.

Counties: Yuba

Optional Success
Story(ies)/Case Summary(ies)

Community Legal established the first client contacts since the program was initiated. As we are starting a new program with substantial obstacles, the first quarter yielded many fewer clients than anticipated. Nevertheless, people have begun to make appointments. It is anticipated that once the Information and Assistance service is up and running, numbers of people needing legal service will increase.

Optional Information on
Collaboration with Other
Advocacy Groups

Community Legal staff made strong contacts with FREED, the Sutter County Superior court, and Yuba County Superior Court. Efforts were intended to educate the general public and partnering agencies on Community Legal services. Being new to Yuba County without an existing referral base, outreach with agencies and organizations willing to partner is critical. Extended collaboration with FREED through joint representation at outreach events such as Veteran's Stand-down events. Once again, the primary focus of the month was to conduct outreach to increase awareness and bring those that qualify and are in need of legal assistance into Community Legal. Once again, the primary focus of the month was to conduct outreach to increase awareness and bring those that qualify and are in need of legal assistance into Community Legal.

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Fiscal Year: 2017-2018

Quarter: 1

Provider: Legal Services of Northern California

Counties: Yolo

Optional Success
Story(ies)/Case Summary(ies)

Betty is 70 years old and just lost her home through foreclosure. The bank bought the home at the foreclosure sale and initiated a lawsuit to evict her. She tried contacting the bank to work out a move out date but she was unsuccessful. She contacted LSNC for assistance after her trial had been set. LSNC represented Betty at trial and was able to negotiate a settlement that involved the bank paying for Betty's moving expenses and providing sufficient time for her to find replacement housing.

Ms. X is an elderly homeowner who received a notice that a lien would be placed on her home for unpaid utility bills. She had not received utility bills for over a year from the local jurisdiction but received utility services. She asked LSNC for assistance because she was concerned that the lien would be foreclosed on and she would lose her home. LSNC negotiated an agreement with the utility provider enabling Ms. X to make monthly installment payments and avoid the recording of the lien.

Ms. A was renting property and permitted her son to move in. The owner did not like the son and served her with a 60-day notice to terminate her tenancy. She moved out but her son remained. Without her knowledge, an eviction lawsuit was filed and an eviction judgment was entered against her. When she found out about the judgment, she immediately sought legal assistance from LSNC. LSNC determined that the lawsuit was not served properly which is why she did not receive notice of the lawsuit in time to defend herself. LSNC attorneys filed a motion to overturn the judgment. The opposing party agreed that service was improper and through a negotiated settlement, agreed to reverse the judgment and dismiss the case against her and also provide a neutral reference to prospective landlords.

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC staff holds office hours at the following locations:

Esparto: 1st Thursday of the month, every other month at RISE;

West Sacramento: 4th Thursday of the month at the Senior Center;

Knights Landing: As needed, 1st Monday of the month at the Center for Families;

Winters: date to be determined. The RISE seniors group no longer meets so we are searching for alternate outreach opportunities in Winters.

Clarksburg: As needed 4th Thursday of the month at library.

Davis: 1st Monday of the month at Grace in Action (housed at the United Methodist Church).

In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, HHSA, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging Alliance (YHAA) and chairs the YHAA Collaboration Subcommittee attended by Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Health and Human Services, Veteran's Services, and representatives from the three Senior Centers. LSNC is also participating in planning meetings for the Yolo County ADRC.

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Provider: Yuba Sutter Legal Center

Counties: Sutter and Yuba

Optional Success
Story(ies)/Case Summary(ies)

Legal assistance hours for the quarter include 254.50 for Sutter County and 182.75 for Yuba County (437.50 total). Legal representation hours include 25.75 for Sutter County and 27.00 for Yuba County (52.75 total). Grand total of service units for the 1st quarter of FY 17/18 total 409.00 hours.

The community education activities for two for Yuba County with 5 hours.

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Community Legal, Inc.

Counties: Nevada

Optional Success
Story(ies)/Case Summary(ies)

We have been assisting one person for over a year, who started off homeless and with an extensive old criminal record. We have assisted him with housing conflicts and successfully assisted him in finding and keeping housing. In addition, we have helped him to remove old and inaccurate aspects of his record, thus removing a barrier to him obtaining housing in the future. The success is not only in helping him find and keep housing in a difficult market, but also in developing a relationship with him so that he feels comfortable turning to us for regular assistance with housing issues, so that we can help him before crisis develops. A second success is that most all of our legal service hours in Nevada City were performed by volunteer attorneys, many of whom are seniors themselves.

Optional Information on
Collaboration with Other
Advocacy Groups

Community Legal staff made strong contacts with FREED, the Sutter County Superior Court, and Yuba County Superior Court. Efforts were intended to educate the general public and partnering agencies on community Legal services. Being new to Yuba County without an existing referral base, outreach with agencies and organizations willing to partner is critical.

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Provider: Sacramento Senior Legal Services

Counties: Sacramento

Optional Success
Story(ies)/Case Summary(ies)

A woman in her early seventies received a 30-day notice to terminate her tenancy from her landlord's attorney, alleging her household income increased such that she was consequently no longer eligible to live in her affordable rental unit. An SLH staff attorney researched the issue and found the woman was not "over-income," as alleged by the landlord's attorney. The staff attorney then contacted the landlord's attorney and demanded rescission of the 30-day notice to terminate the woman's tenancy, citing federal rules and regulations supporting the woman's continued eligibility for her housing. After reviewing the staff attorney's research and contacting the state agency responsible for the administration of that particular type of affordable housing, the landlord's attorney agreed to rescind the notice to terminate the woman's tenancy. This allowed the woman to avoid a potentially wrongful eviction.

A woman in her early sixties received a letter from the Sacramento's Code Enforcement Department, demanding that she pay nearly \$1,500.00 in delinquent fees to the City or risk losing her recently purchased home to a forced sale. The woman identifies as limited-English proficient ("LEP"), and does not read, write, speak, or understand English. A staff attorney reviewed the letters that the City's Code Enforcement Department sent to the woman, and determined that the City failed to provide proper notices in the woman's primary language to inform her of her procedural rights. The staff attorney drafted a legal brief and appeared with the woman at a City Council hearing, where he was prepared to argue that the City had failed to give proper notice to the woman and needed to reverse the fees it assessed against her. The City's Chief Code Enforcement Officer met with the attorney before the hearing and offered to remove the hearing from the City Council's agenda and to review the woman's file. A few weeks later, the Code Enforcement Department notified the staff attorney that it had waived all fines assessed against the woman, thereby eliminating the risk that the City would force the sale of the woman's home to recover those fees.

A woman in her early seventies began experiencing multiple health issues and needed to move out of her apartment into hospice care. She contacted the Senior Legal Hotline ("SLH") to inquire about legal procedures to allow her daughter to handle her finances and healthcare decisions. A volunteer paralegal advised the woman about the pros and cons of drafting a Durable Power of Attorney ("DPOA"), which would allow the woman's daughter to make financial decisions on the woman's behalf, and an Advance Health Care Directive ("AHCD"), which would allow the daughter to make healthcare decisions for the woman. The volunteer paralegal also advised the woman about the benefits and dangers of adding another person—even a trusted individual like her daughter—as a joint owner or account holder for certain types of property. With the volunteer paralegal's advice, the woman was able to ensure that she had an agent to handle her affairs in case of incapacity.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Placer

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we provide we are not able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the CA Department of Justice, various district attorneys' offices, law enforcement and medical/social service providers on cases for our older clients.

Provider: Community Legal, Inc.

Counties: Sierra County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

This quarter, reduced funding resulted in fewer visits to Sierra County and unfortunately less service provided than in the prior fiscal year.

Provider: Community Legal, Inc.

Counties: Sutter

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Community Legal established the first client contacts since the program was initiated. However, no appointments set with Sutter County residents this quarter. All educational activities were offered to Sutter County residents, but none attended. Educational activities are not billed separately, but appear on all aggregate reports for all Counties served as they are offered to residents of all Counties served by Community Legal Inc.

The primary focus of the quarter was to conduct outreach to increase awareness and bring those that qualify and are in need of legal assistance into Community Legal. Community Legal staff made strong contacts with FREED, the Sutter County Superior Court, and Yuba County Superior Court. Efforts were intended to educate the general public and partnering agencies on Community Legal services. Being new to Sutter County without an existing referral base, outreach with agencies and organizations willing to partner is critical. Extended collaboration with FREED through joint representation at outreach events such as Veteran's Stand-down. Once again, the primary focus of the month was to conduct outreach to increase awareness and bring those that qualify and are in need of legal assistance into Community Legal.

PSA: 5

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Quarter: 1

Provider: Legal Aid of the North Bay

Counties: Marin County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 6

California Legal Services (Title III B)
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Quarter: 1

Provider: Asian American Advancing Justice - Asian L **Counties: San Francisco**
our Counsel

Optional Success
Story(ies)/Case Summary(ies)

Client Z is a 61-year old, disabled woman on a fixed, limited income. She is a monolingual Cantonese speaker. Client Z and her husband have rented two rooms in a larger home for more than seven years.

At the end of July 2017, real estate professionals bought the home in which Client Z lived. When Client Z first met the new owners in person, she offered to pay them her rent for August, but they refused to accept it, saying they were not collecting it "yet." They did not provide her with basic information, such as their full names or mailing address, so that she could pay rent by mailing them a check. Even worse, the landlord that the new owners selected was calling Client Z repeatedly and telling her she needed to move out. In a three month period, Client Z tried to pay rent no less than ten times, and each time, her rent was rejected. Instead, the landlord tried to scare Client Z into leaving her longtime home on six different occasions. In one call, the landlord said to Client Z, "If you do not move out, I will do whatever it takes to evict you." Client Z was completely overwhelmed and had already started looking for new housing when she came to our clinic and we explained that the landlord's actions were illegal and constituted tenant harassment.

But before we could move forward with writing the landlord a cease and desist letter, the new owners served Client Z with a Three Day Notice to Pay Rent or Quit for non-payment of rent, although they were the ones that refused to accept rent! The notice was written in English and was confusing to Client Z because it listed an amount for the rent due that was much higher than what Client Z owed.

We helped Client Z by writing the new owners' attorney a letter detailing the new owners' refusal to accept rent and their attempts to take advantage of a woman who they were aware was both elderly and had limited English proficiency. We pointed out the many ways the new owners violated the law and the fact that the notice they served on Client Z incorrectly stated the rent amount due. After our advocacy, the new owners agreed to withdraw the Three Day Notice to Pay Rent or Quit and Client Z is still living in her longtime home.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: La Raza Centro Legal, Inc.

Counties: City & County of San Francisco, CA

Optional Success
Story(ies)/Case Summary(ies)

In the month of August I took a social security disability case. The client contested a no disability decision for a one year period prior to a period of disability that social security had already approved. The social security administrative law judge had received a remanded decision from the Appeals Council of Social Security. The Appeals Council disagreed with the judge's reading of the law and the outcome of her decision based on her application of law. Building on these arguments and findings used by the Appeals Council in the remand of the decision, I was able to point out inconsistencies in logic, medical evidence, and legal standards used by the social security judge and the judge subsequently reversed her own decision as to the year of disability. The judge found that her application of the law was in error. The judge awarded my client disability benefits in the amount of nearly \$10,000 for the year period.

Optional Information on
Collaboration with Other
Advocacy Groups

MONTHLY LEGAL CLINIC WITH CURRY SENIOR CENTER FIRST THURSDAY OF THE MONTH
MONTHLY LATINO PARTNERSHIP FOR SERVICE PROVIDER MEETINGS AND PRESENTATIONS
TO GROUPS OF SERVICE PROVIDERS INCLUDING CAREGIVER ALLIANCE
MONTHLY OUTREACH PRESENTATIONS ON LEGAL TOPICS TO LOCAL SRO TENANTS
COLLABORATION WITH EDC ATTORNEY IN EVICTION CASE FOR ELDER
QUARTERLY ELDER RIGHTS BULLETIN WITH ALLIED LEGAL SERVICE PROVIDEDS – LA RAZA
WROTE FALL ISSUE ON HOUSING DISCRIMINATION

Provider: Nihonmachi Legal Outreach dba API Legal O Outreach

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Staff assisted an elderly client at a clinic in San Francisco and followed up in our office to help him draft a letter to his doctor with instructions on filling out the N-648 disability waiver form, with an attached sample. Staff explained to client the importance of establishing a nexus between client's medical/mental condition, and his inability to study for the English/Civics test otherwise required for naturalization. Staff called client to explain and advise him to take the letter to his doctor's appointment and to call if there were any issues. Client successfully obtained a signed N-648 from his doctor and went ahead to proceed in filling out his N-400 with disability waiver. Because of client's age and language barrier, staff was initially worried about whether he understood the complexity of the N-648 disability waiver over the phone. He had disabilities and no one to take him to our office for an in-person consultation. Thankfully, he was able to take the mailed letter with the requirements for filling out N-648 to his doctor, and obtain a signed waiver with which he can now apply for naturalization.

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Assistance to the Elderly

Counties: San Francisco

Optional Success
Story(ies)/Case Summary(ies)

Our client is 73-year old blind woman who has lived in SF for over 40 years. An unreported change in her social security payments resulted in a retroactive rent increase – she was suddenly \$3300.00 behind in rent! The landlord filed an eviction action against her. LAE stepped in, double checked the amount owed, negotiated a settlement where our client would be able to stay and we were able to secure assistance from another agency in assisting her pay the back rent that was owed.

Optional Information on
Collaboration with Other
Advocacy Groups

We have a strong ongoing collaborative relationship with Adult Protective Services. They consult with us on a regular basis on landlord tenant and elder abuse issues and refer a significant number of clients to our legal staff. In many instances they continue working with our clients after the referral and facilitate our representation by providing services such as translation, transportation and emotional support. We also work with other legal services organizations and community based non-profits, providing assistance and representation when needed.

PSA: 7

Provider: Contra Costa Senior Legal Services

Counties: Contra Costa

Optional Success
Story(ies)/Case Summary(ies)

CCSLS assisted a 68 year-old disabled woman who lived in subsidized housing in Richmond. She faced the threat of eviction, and losing her subsidy, due to her inability to get along with her neighbors. Much of the behavior that was cited in the notice to terminate tenancy resulted from her mental and physical disabilities. CCSLS staff interceded on the client's behalf and negotiated a resolution that gave the client time to find a more suitable living situation while keeping her subsidy. CCSLS assisted a senior in East Contra Costa County with obtaining protection from elder abuse. The senior was the victim of harassing telephone calls from a family member. In the calls, among other things, the family member insulted the client and told him that he wished he would suffer an illness and die. A CCSLS staff attorney represented the client and prevailed at the hearing. The client now has a restraining order which will protect him from abuse for five years.

Optional Information on
Collaboration with Other
Advocacy Groups

We are coordinating with the area Ombudsman Services organization to provide services to residents of board and care facilities. We are also working in collaboration with other senior care providers, the district attorney's office, and others on a county-wide project to provide services to victims of elder abuse.

PSA: 8

California Legal Services (Title III B)
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Quarter: 1

Provider: Legal Aid Society of San Mateo County

Counties: San Mateo

Optional Success
Story(ies)/Case Summary(ies)

Mr. J, who is 70 years old, had a dispute with his neighbor about the fence that divided their properties. He had asked his neighbor to help pay for the survey because it would benefit both of them to know exactly where the fence should be established. The neighbor refused. Our Emeritus Attorney advised Mr. J. about the obligation of the neighbors to share in common fence expenses and guided him through the small claims court and appeal proceedings. Mr. J won a judgement that covered the neighbor's share of the expenses.

Optional Information on
Collaboration with Other
Advocacy Groups

No new collaborative activity this quarter.

PSA: 9

California Legal Services (Title III B)

PSA Level Quarterly Narrative Report

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Quarter: 1

Provider: Legal Assistance for Seniors

Counties: Alameda

Optional Success
Story(ies)/Case Summary(ies)

Legal Assistance for Seniors represented Ms. T, a 65 year old maternal great grandmother, obtain guardianship of her 6 yo great-granddaughter, D.

Ms. T, along with her husband, has been caring for the minor on and off since her birth. However, the minor is approaching the age where legal guardianship is required to sign the child up for school, medical coverage and other benefits and activities.

Ms. T and her husband contacted LAS to start the guardianship process so she could make educational and medical decisions for D. The minor's mother consented to the gship at that time.

LAS prepared Ms. T's guardianship petition and filed it. However, before the general hearing, mom started to make threats to come and take D from client's home. Mom has been known to abuse substances and is not stable. LAS promptly met with client to file a temporary guardianship to protect the minor. The temp was granted and we attempted to serve mom. Paternal grandmother become involved and appeared at the temp hearing. Mother did not appear. The temp was granted and we facilitated a conversation between paternal gma and client about visitation and keeping the paternal family involved with the minor. LAS then represented client at the general hearing in court. With LAS' assistance, Ms. T was granted guardianship of D without objection.

Client was very grateful for LAS' assistance with obtaining guardianship and maintaining the status quo for D.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to serve clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

PSA: 10

California Legal Services (Title III B)
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Quarter: 1

Provider: Senior Adults Legal Assistance (SALA)

Counties: Santa Clara County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services
For the 1st quarter of 2017-18, SALA provided on-site legal service intake appointments at 24 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center temporarily located at Gardner Community Center during Alma's renovation (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Los Gatos Recreation Center, Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

PSA: 11

Provider: Council for the Spanish Speaking

Counties: San Joaquin

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 12

California Legal Services (Title III B)
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Quarter: 1

Provider: Catholic Charities Diocese of Stockton

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu
mes**

Optional Success
Story(ies)/Case Summary(ies)

None

Optional Information on
Collaboration with Other
Advocacy Groups

None

PSA: 13

Provider: Senior Citizens Legal Services

Counties: Santa Cruz County & San Benito County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 14

Provider: Central California Legal Services, Inc.

Counties: Fresno & Madera

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 15

California Legal Services (Title III B)
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Provider: Central California Legal Services, Inc.

Counties: Kings County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

Provider: Central California legal Services Inc.

Counties: Tulare County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 16

California Legal Services (Title III B)

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Quarter: 1

Provider: California Indian Legal Services

Counties: Inyo & Mono

Optional Success
Story(ies)/Case Summary(ies)

As we now have an emphasis to focus of our services towards more legal and community education including referrals, we are currently planning out the community education presentations that will be held at separate various senior centers in Inyo and Mono counties for the upcoming quarters and provide continued distribution of recently updated referrals, legal education materials and self-help packets. The following are two clients success stories from direct legal services that were provided during the reporting period:

A 62 year old senior had purchased a trailer from a private seller and was having difficulty transferring the registration and title into his name because he did not understand the process, documents or all the agencies involved. We met with the client and reviewed his paperwork from the Inyo County Assessor and Department of Housing and Community Development. Our advocate staff advised the client on the specific forms and paperwork that needed to be completed and submitted for both entities and why; taxation issue from Inyo County and the trailer's tilting and registration. We also assisted the client in completing and filling out the Inyo county Assessor paperwork. Our advocate staff also contacted the Department of Housing and Community Development to determine when the trailer was last registered and what fees were due to prepare the title change documents. We assisted in the preparation of these forms for the client and provided instructions for the client to complete the process. The client was very appreciate and very happy that we could assist him to complete the transfer process.

We assisted an 80 ear old client who contacted our office to make modifications to her Advance Health Care Directive (AHCD) to minimize any potential for elder abuse by extended family members. Our attorney staff met with the client to ensure competency and assisted the client with modifying her AHCD and provided additional information on Power of Attorney forms. The client was very appreciative of our assistance and felt at ease with the legal protections in place to protect her during medical emergencies.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 17

California Legal Services (Title III B)
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Provider: Senior Legal Services Project

Counties: San Luis Obispo

Optional Success
Story(ies)/Case Summary(ies)

A vulnerable senior was the victim of predatory credit practices and financial abuse which included the opening of an unauthorized Wells Fargo account. A Project attorney sent letters on the client's behalf which resulted in the termination of the unauthorized account and reversal of the fraudulent expenses incurred. The client wanted to sell his home so that he could enter a care facility. His deceased wife's adult daughter moved in to his home and would not leave. She was possibly dealing drugs from the residence and had a number of unwelcome guests. We served an eviction notice and ultimately received a judgement in the client's favor in less than one month. We represented a senior suffering from advanced Parkinson's disease who required 24/7 care and lived on \$850 per month. His son was trying to evict him and his caregiver from the land that our client gifted to his son many years earlier. We defended our client at the eviction trial and prevailed on a pretrial motion for judgement on the pleadings.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 18

Provider: Grey Law of Ventura County

Counties: Ventura County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 19

California Legal Services (Title III B)
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Fiscal Year: 2017-2018

Quarter: 1

Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 20

California Legal Services (Title III B)
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Quarter: 1

Provider: Inland Counties Legal Services, Inc.

Counties: San Bernardino

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 17E-7003062

A 77 year old disabled senior who was a widower and veteran requested ICLS services regarding a lawsuit he was served with for over \$17,000. Years ago he had purchased a motor home. When he was no longer able to make the payments he returned the motor home. After it was sold the balance for the deficiency was \$12,360.88. The client lives on a fixed income which consists of his SSA retirement benefits and his Veterans Administration pension (which pays for his caregiver). His home has a reverse mortgage.

The client offered to make payments of \$100/month but the Credit Union wanted more money. The credit union sent the account to collections, again the client offered to make payments of \$100/month but they also refused and instead filed a lawsuit. The advocate advised the client that if he did not respond within 30 days of being served a default judgment would be entered against him. If he responds, the court will schedule a hearing and render a decision. The client was assisted in filing a response. He stated that he wanted to pay the bill but he could only afford \$100/month and the collection agency also refused to accept that. The client did not want to go to court because he has about 2-3 medical appointments weekly and requires a wheelchair to get around.

The client was advised that the advocate could contact opposing counsel on his behalf and attempt to negotiate a monthly payment plan. If an agreement is reached he would not have to make a court appearance. The advocate was successful in negotiating on the client's behalf for all of the interest to be waived and the client would only be responsible for the principal, attorney fees and court costs. The client signed a Stipulation for Immediate Entry of Judgment and will avoid having to pay back interest in the amount of \$5,043.11 as well as any future interest provided he does not default.

Case #2: 17E-7002689

ICLS's client had received notice of a SSI overpayment in the amount of \$7,182.60. It was actually her granddaughter's overpayment. The granddaughter is 15 years old and has been on SSI since she was an infant. Social Security had reviewed her case and found her no longer disabled.

The client is retired and has had guardianship over her granddaughter for her entire life. The client also has 2 adult children living with her who are unemployed and have their own mental issues. The client is on a fixed income and supports the household. With the loss of her granddaughters SSI she could not afford to repay the overpayment.

The advocate helped the client file a Request for Waiver of Overpayment with the SSA for the full amount. The SSA did waive the full amount of the overpayment.

Case #3: 17E-7005706

The client is a 73 year old divorced senior who was requesting assistance regarding her credit card debt.

California Legal Services (Title III B)

PSA Level Quarterly Narrative Report

Fiscal Year: 2017-2018

Quarter: 1

She had been referred by her apartment complex management. When she retired her income was reduced and fixed consisting of her SSA Retirement and a small pension. She had to cut her expenses and began making the minimum payment on her credit cards. She had always had excellent credit and did not want to jeopardize her credit score. She contacted her credit card companies and requested that her minimum payment and interest be reduced but they would not consider it. She was current on all of her accounts but was concerned about what would happen if she was unable to pay and was considering filing for bankruptcy but did not know if she could.

The advocate advised the client on her options. Her first option was that she could file bankruptcy if she wanted to but because she did not own any real property and was no longer working she had nothing to protect and her income from her pension and SSA were protected by both Federal and State Statutes. If she was sued and lost, a judgment would be entered against her however they would not be able to collect from her income and her personal property was also protected.

Secondly, if she was to fall past due she could make payment arrangements to avoid a lawsuit but the payments would be more than what she is currently paying.

Third, based on her income, her total household expenses (necessities, rent, food, utilities, etc.) and the minimum payment on each of her credit cards, she could continue to keep her accounts current and her credit score but she would be making the minimum monthly payments for a long time.

The advocate prepared a budget for the client listing her income, household expenses and credit card payments. The client was advised that she could pick one of her credit cards to pay off by sending more than the minimum payment – it could be the one with the lowest balance or the highest balance. When it was paid off she could pick another card to pay off until all the cards were paid off.

The advocate advised that the client that it was her decision which option she was going to choose. If she decided not to pay she may be served with a lawsuit and if that happens, she should contact ICLS immediately for legal assistance. If she decided to file bankruptcy, she should consult with an attorney who specializes in bankruptcy.

The client contacted the advocate at a later date and told her that she was sticking to the budget the advocate had prepared for her.

Optional Information on
Collaboration with Other
Advocacy Groups

In-Kind Support to Title III-B Legal Services for Seniors
Department on Aging & Adult Services
(Hours not reported elsewhere in Quarterly Report)

314 In-Kind Case Hours
27 In-Kind Supervision Hours (case related)
0 In-Kind Outreach Hours
0 In-Kind Community Education Hours

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PSA: 21

California Legal Services (Title III B)
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Provider: Inland Counties Legal Services, Inc.

Counties: Riverside

Optional Success
Story(ies)/Case Summary(ies)

Case #1: 17E-2006681

The client, a 70 year old gentleman, has resided in a local motel for 15 years. While he appears to have some memory issues he was lucid and able to discuss his legal issues. He received a letter from Social Security dated August 15, 2017 stating that he was being denied SSI benefits because he was not a U.S. Citizen or national or eligible alien.

The advocate verified that the client is, in fact, a U.S. legal resident. His status indicates that he had been a resident since January 18, 1990 and that his LPR card does not expire until May 25, 2021. The SSA regulations state that if he was not receiving SSA benefits on or before August 21, 1986 that he would be denied solely on immigration status. He will not need to appeal through SSA. The client will be able to apply and receive CAPI (MPP 49) benefits for eligible immigrants. He can apply through his local DPSS and show proof of his turndown from SSA. He can also apply and receive food stamp benefits and should qualify to receive even more than the SSI program would have provided him with.

Should the client become a U.S. Citizen he will have to discontinue CAPI and then apply again for SSI. He has been referred to an advocate who is working with clients on obtaining U.S. Citizenship to discuss further options and reasons he might want to apply for citizenship.

Case #1: 17E-4005093

The client is a 79 year old disabled woman who sought assistance regarding a Notice to Pay Rent or Quit for back sums owed. She could not understand why the landlord was claiming that the amounts were owed. After the advocate reviewed the clients paperwork she found a notice that had been mailed to her reflecting a rent increase. The client had been told by the management that her file had already been forwarded to their attorney for an Unlawful Detainer to be filed. The client was then served with the Unlawful Detainer. The advocate assisted the client in preparing an Answer to the Complaint and agreed to try to settle the case with the landlord's attorney. A move out date was negotiated and payment arrangements were made whereby so long as the client makes the agreed upon payments her case will be dismissed.

Case #1: 17E-4007400

ICLS's client is a 70 year old woman who wanted advice regarding her current government benefits. She is receiving Social Security Retirement Benefits. In addition, she receives reduced SSI Old Age Benefits. She did not know why she was not getting her full SSI payment. After reviewing the client's notices the advocate discovered that the client was not getting full benefits because Social Security believed that she was getting an "in-kind" contribution of food and shelter. The client stated that she was not receiving free food or shelter. She pays \$300/month for her rent and utilities.

The client was advised to provide copies of her lease agreement and rent receipts to the local Social

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Optional Information on
Collaboration with Other
Advocacy Groups

Security Office as soon as possible. Social Security will recalculate her benefits and will start to pay her the full SSI payment and her income will be increased by about \$250/month.

PSA: 22

Provider: Legal Aid Society of Orange County

Counties: Orange

Optional Success
Story(ies)/Case Summary(ies)

SCLAP assisted a 74 year old man with several legal issues. The client had an issue with his Section 8 voucher which he has been receiving since 2000. In early March of 2017 he was hospitalized for MRSA. He has been in and out of the hospital for 4 months. He would be released from the hospital and then would have to go back into the hospital for the same medical issues. During this time, he was required to turn in his HUD recertification. The Housing Authority was in the process of terminating him because he has not responded to their inquiries. The client did attempt several times to contact the Housing Authority from the hospital, but was unsuccessful. SCLAP contacted the Housing Authority on the client's behalf and provided them with all the records for his hospital admittance and discharge. Through SCLAP's efforts, the client was able to prevent his housing termination. Additionally, when the client was finally discharged to his home, we discovered through our home visits that he could not perform any daily living skills on his own or even to get access to food or water because he was completely bed bound with no friends or outside assistance. Through our efforts we were able to get the client Meals on Wheels and IHSS services (his application for IHSS had lapsed while he was in the hospital and we were able to get it reinstated on an emergency basis).

Optional Information on
Collaboration with Other
Advocacy Groups

Through our collaborations with the Elder Abuse Task Force of Orange County, we continue to get referrals for representation for Elder Abuse Restraining Orders and estate planning (mainly Powers of Attorney). We have represented several seniors in the Elder Abuse Restraining Order hearings through these referrals.

PSA: 23

California Legal Services (Title III B)
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Provider: Elder Law & Advocacy

Counties: San Diego

Optional Success
Story(ies)/Case Summary(ies)

Case 1

Mr. C contacted EL&A about an outstanding balance on a cash loan which was secured with his vehicle ("vehicle title loan"). The amount borrowed was \$2,600, with an interest rate of 148.59% and a two-year repayment period. Mr. C made his regular monthly payments from May of 2015 up through January of 2017, but after that, was no longer able to afford the payments. As of January of 2017, Mr. C had already paid \$4,042 on the \$2,600 loan.

California laws do not restrict the interest rates on loans of more than \$2,500 and do not regulate this type of vehicle title loan. Incapacity will only void a contract if the second party knew or should have known of the first party's incapacity. Mr. C stated that he has a serious mental health condition and was on several strong medications at the time the money was borrowed. Mr. C said that it would have been obvious to anyone interacting with him that he was "out of it".

The EL&A attorney advised Mr. C on applicable laws and offered to contact the lender on Mr. C's behalf. Mr. C said that he just wanted the debt resolved and the security interest on his car removed. The EL&A attorney drafted a letter to the lender laying out Mr. C's defense of obvious incapacity and offering a settlement allowing the lender to keep all money already collected, but to consider the debt paid in full with termination of the lender's security interest in Mr. C's car. The lender countered with an offer to settle for an additional payment of \$576.91, but eventually agreed to consider the entire debt settled for no additional payments, with termination of the security interest on Mr. C's vehicle.

Case 2

Client's husband sustained a serious head injury after a fall and after being hospitalized, was referred to a memory care residence. Husband's health deteriorated substantially at the memory care residence and he was quickly transferred to a higher level of care at a post-acute care facility.

The memory care residence, according to the admissions contract, requires residents to give a thirty day notice prior to moving - no exceptions. If proper notice is not given, the facility requires an additional payment of a month's fees. The memory care residence billed client for an additional month because the required thirty day notice was not given. Client was being billed \$5,565.

The Elder Law & Advocacy attorney contacted the executive director of the memory care residence regarding this bill. The attorney was able to convince the executive director that under the circumstances, a thirty day notice was not possible and that client should not be liable for the for the additional thirty days. The executive director agreed to not pursue the outstanding bill with client.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER.

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Provider: Elder Law & Advocacy

Counties: Imperial

Optional Success
Story(ies)/Case Summary(ies)

Success Story #1:

Our client, an elderly, low-income, non-English speaking man was convinced to obtain a farm labor contractor license, and to use the license with trusted relatives in order to run a large business operation. Client was inexperienced in business negotiations, and was effectively shut out from monitoring the use of his own license. His relatives promised him all laws were followed, and they assured him proper accounting methods were utilized. However, Client's relatives completely failed to pay mandatory employee taxes, and Client was left with a multi-million dollar debt to the Employment Development Department.

Client hired an attorney to sue his relatives for fraud and other claims, but later became hospitalized and was unable to follow up on his own case. Client's attorney withdrew from the case due to the lack of contact, but left Client's case without filing default paperwork and without serving all defendants.

The ELA attorney was able to quickly advise Client on his various concerns, and explained how to properly obtain a default and how to complete service on the remaining defendants. Client had a pending hearing, and dismissal of defendants would have resulted in a statute of limitations issue. Client was also advised on how to locate a new attorney to take over the case. Though Client faces an uphill battle as a victim of such massive fraud, the opportunity to pursue his claim was preserved by the quick response of the ELA attorney.

Success Story #2:

Our client, an 85 year-old single, low-income senior, who relies on a wheelchair for mobility, needed assistance during a redetermination for SSI. The Client lives in a senior apartment, but inherited property which he was unable to maintain. The property was deemed uninhabitable by the county several years ago, but it is still titled to Client. Because of strict property rules for receipt of SSI, Client needed to provide various documentation and statements to the Social Security office. The ELA program assistant assisted Client with preparation of necessary documents for submittal to Social Security. Due to confusing language in response letters received from Social Security, Client was not sure whether he needed to provide any additional information. Thus, the ELA attorney contacted the local Social Security office directly on Client's behalf, and confirmed no further action was necessary by Client. Without ELA's assistance, it would have been very difficult for Client to ensure his monthly benefits continued without interruption.

Optional Information on
Collaboration with Other
Advocacy Groups

NOT APPLICABLE FOR THIS QUARTER

PSA: 25

California Legal Services (Title III B)
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Quarter: 1

Provider: Bet Tzedek

Counties: Los Angeles County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 26

Provider: Legal Services of Northern California

Counties: Mendocino and Lake

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 27

Provider: legal Aid of Sonoma County

Counties: Sonoma

Optional Success
Story(ies)/Case Summary(ies)

Linda is 67 years old and a victim of many years of spousal abuse. When Linda finally had enough, Legal Aid sought and obtained a restraining order against her abusive husband. However, Linda then had another problem. Suddenly her housing was in jeopardy. She and her abuser were co-holders of a Section 8 certificate. When he moved out of their house pursuant to the TRO, the Housing Authority moved to terminate her Section 8. Legal Aid again advocated for Linda and convinced the HA to allow Linda to retain her voucher—thereby saving Linda's housing. Finally, we are now assisting her with a divorce.

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 28

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Provider: Bay Area Legal Aid

Counties: Napa

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

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Provider: Legal Services of Northern California

Counties: Solano County

Optional Success
Story(ies)/Case Summary(ies)

1. Ms. J came to our office after receiving a Medi-Cal Notice of Action stating that she was no longer eligible for the Medi-Cal Aged and Disabled Program and informing her she now had a large share of cost. The reason for the change in her enrollment was due to the County including her ex-husband's income in her eligibility determination. Ms. J was not divorced but had been separated from her husband for several years. However, she had changed her mailing address to her husband's address because her mail was being stolen at her primary residence. Our office assisted the client in filing a state fair hearing request. While waiting for the hearing date, the client attempted to gather documentation to show that she did not live with her ex-husband. Ms. J was unable to gather all required documentation prior to the hearing date so our office attended the hearing with her and requested a postponement. At that time, the county representative stated that if we submitted certain documents the County would be able to change the address in their system and avoid the need for a hearing. I assisted the Ms. J in supplying the County with this information. The client was determined to be eligible once again for full scope Medi-Cal benefits. 2. Mr. W came to our office after receiving a 60 day notice of non-renewal of his tenancy. Mr. W was a homeowner in a mobilehome park and under CA law, his tenancy could only be terminated for specific reasons, non-renewal of tenancy not being one of the allowed reasons. Our office drafted a letter to the opposing counsel citing the applicable law and asking for rescission of the 60 day notice. The park refused to rescind the notice and instead filed an unlawful detainer after expiration of this notice. Our office assisted the client in filing a demurrer to the unlawful detainer complaint based on the bad notice. Our office represented the client at the hearing on the demurrer. The judge ruled in our favor at the demurrer hearing and gave the opposing party leave to amend their complaint. No amended complaint was filed. The opposing party dismissed the case. Mr. W was allowed to remain in the park. 3. Mr. S contacted our office after he was told by Medi-Cal and Social Security that he had been deemed deceased and his benefits had been cut off. The client had tried to resolve the issue with both the County and Social Security but had been unable to get the system adjusted to remove the "Deceased" mark from his file. Our office contacted DHCS to resolve the Medi-Cal issue. After we were unable to resolve the issue informally, we filed a hearing requested based on the error by DHCS. We also submitted a problem report to the Medicare State Buy-In unit. Eventually all the client's records were updated and his Medi-Cal eligibility was retro-ed back to the date he was marked as "deceased." Social Security sent letter agreeing to pay back all Medicare premium payments that were deducted from the client's social security checks.

Optional Information on
Collaboration with Other
Advocacy Groups

Continued collaboration with Ombudsman Services in Solano County and Senior Legal Hotline.
Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior Roundtable.

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Provider: Senior Legal Services

Counties: El Dorado County

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups

PSA: 30

Provider: SeniorAdvocacy Network

Counties: Stanislaus

Optional Success
Story(ies)/Case Summary(ies)

Assisted woman who was financially abused by her bank teller and DA is looking at case for possible criminal charges. Assisted 3 separate clients in stopping fraudulent Security system scams; security company came to their door promising to lower their monthly fees and pay off existing company. Was able to get companies to agree to cancel the new services and seniors went back to their old reliable companies. Filed 7 Elder Abuse Restraining Orders on behalf of 98 year old man against his wife, children and grandchildren who were living off him for years and financially draining him. Case is still not resolved but all "squatter" are out of house and husband and wife have reconciled.

Optional Information on
Collaboration with Other
Advocacy Groups

We continue to work closely with the Ombudsman, APS, Area Agency on Aging and Project Sentinel when they need our legal services.

PSA: 31

California Legal Services (Title III B)
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Quarter: 1

Provider: Central California Legal Services

Counties: Merced

Optional Success
Story(ies)/Case Summary(ies)

July 2017 - A senior had a dispute with her landlord regarding issues of a reasonable accommodation. However, instead of an accommodation, client received a 30-day notice to vacate the premises. Client was willing to move out, but needed more than 30-days. We were able to negotiate an extended move-out timeline to give the client sufficient time to find a new place and to find help to help her move out. August 2017 - A senior was being abused by a relative that was living with her. Due to the abuse the senior was suffering severe anxiety and emotional distress. This distress was so acute that it was manifesting physical symptoms and hurting the senior's health. The senior was constantly afraid for her safety in her own home. We were able to assist the senior by filing a restraining order and getting the abuser to move out. The senior was extremely grateful for our assistance and is now feeling much better and safer in her own home.

Optional Information on
Collaboration with Other
Advocacy Groups

July 2017 - Attended the Merced Advisory Council meeting at the Merced Area Agency on Aging. August 2017 - Attended the Merced Advisory Council meeting at the Merced Area Agency on Aging.

PSA: 32

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2017-2018

Quarter: 1

Provider: Legal Services for Seniors

Counties: Monterey

Optional Success
Story(ies)/Case Summary(ies)

1. Consumer Fraud - Mr. and Mrs. Jackson (not their real names), age 82 and 77 live in a rural part of Monterey County. A solar panel sales person came to their house and talked them into an exorbitantly high (\$30,000) contract with financing costs doubling the price to (\$60,000) of the solar panels. Having second thoughts, the Jacksons asked to cancel the contract and get their (\$1,500) down payment back. The salesperson was not licensed to sell solar panels and was able to get our clients released from the contract and their down payment returned.

2. Caregiver - Limited Conservatorship. An advocate assisted a Father Acting as Conservator for his adult disabled son. We represented Mr. Lane (not his real name) who is an 83-year-old father and who was appointed as conservator for his 55-year-old son, Alex, who developed dementia at the middle age of 35. Son Alex was married with a family and progressively lost mental and physical abilities. Now Mr. Lane and his wife are presently taking care of Alex their son. This is a case of on-going representation for a Caregiver client. Mr. Lane is a loving caretaker for his son. Mr. Lane was previously a high school teacher in Salinas. At the age 83, Mr. Lane is trim and fit and sharp in mind. He looks like he is 60 years old (i.e. Jack Lalanne fitness Expert). We helped Mr. Lane establish the limited conservatorship for his son. Every two years Mr. Lane must appear in Court for a review of medical attention about medicines Alex must take. Alex is no functional or competent to make decisions on his own. We monitor and speak directly with doctors at University of California San Francisco concerning medications and court forms the medical doctors must file for Mr. Lane on behalf of his son. We have a Court review hearing in December on the issue of medication and whether medicine can be administered without further court order. Because Alex may need anti-psychotic medicine in the future we are requesting on behalf of Mr. Lane the court continue to review the matter every two years with a report.

Optional Information on
Collaboration with Other
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, The Santa Cruz Senior Citizens law Center, other agencies and organizations.

PSA: 33

California Legal Services (Title III B)
PSA Level Quarterly Narrative Report

Fiscal Year: 2017-2018

Quarter: 1

Provider: Greater Bakersfield Legal Assistance, Inc. Counties: Kern

Optional Success
Story(ies)/Case Summary(ies)

Optional Information on
Collaboration with Other
Advocacy Groups